

**FINANCIAL DISCLOSURE REPORT  
FOR CALENDAR YEAR 2012**

*Report Required by the Ethics  
in Government Act of 1978  
(5 U.S.C. app. §§ 101-111)*

|                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                              |                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>1. Person Reporting</b> (last name, first, middle initial)<br><br>Helmick, Jeffrey J.                                                                                            | <b>2. Court or Organization</b><br><br>U.S. District Court, OH-N                                                                                                                                                                                                                             | <b>3. Date of Report</b><br><br>05/15/2013                       |
| <b>4. Title</b> (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)<br><br>U.S. District Judge - Active Status                     | <b>5a. Report Type</b> (check appropriate type)<br><br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final<br><b>5b.</b> <input type="checkbox"/> Amended Report | <b>6. Reporting Period</b><br><br>01/01/2012<br>to<br>12/31/2012 |
| <b>7. Chambers or Office Address</b><br><br>1716 Spielbusch Avenue, Suite 210<br>Toledo, OH 43604                                                                                   |                                                                                                                                                                                                                                                                                              |                                                                  |
| <b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information. |                                                                                                                                                                                                                                                                                              |                                                                  |

**I. POSITIONS.** (Reporting individual only; see pp. 9-13 of filing instructions.)

☐ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

- |                              |  |
|------------------------------|--|
| 1. Member, Board of Trustees |  |
| 2.                           |  |
| 3.                           |  |
| 4.                           |  |
| 5.                           |  |

**II. AGREEMENTS.** (Reporting individual only; see pp. 14-16 of filing instructions.)

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

- |    |  |
|----|--|
| 1. |  |
| 2. |  |
| 3. |  |

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**III. NON-INVESTMENT INCOME.** *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)***A. Filer's Non-Investment Income**☐ NONE *(No reportable non-investment income.)*

| <u>DATE</u> | <u>SOURCE AND TYPE</u>                | <u>INCOME</u><br>(yours, not spouse's) |
|-------------|---------------------------------------|----------------------------------------|
| 1. 2012     | Self-employed attorney - gross income | \$40,420.67                            |
| 2.          |                                       |                                        |
| 3.          |                                       |                                        |
| 4.          |                                       |                                        |

**B. Spouse's Non-Investment Income -** *If you were married during any portion of the reporting year, complete this section.**(Dollar amount not required except for honoraria.)*☐ NONE *(No reportable non-investment income.)*

| <u>DATE</u> | <u>SOURCE AND TYPE</u>              |
|-------------|-------------------------------------|
| 1. 2012     | Staff attorney, [REDACTED] - salary |
| 2.          |                                     |
| 3.          |                                     |
| 4.          |                                     |

**IV. REIMBURSEMENTS** *-- transportation, lodging, food, entertainment.**(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)*☐ NONE *(No reportable reimbursements.)*

| <u>SOURCE</u>                                | <u>DATES</u>                           | <u>LOCATION</u> | <u>PURPOSE</u>           | <u>ITEMS PAID OR PROVIDED</u>        |
|----------------------------------------------|----------------------------------------|-----------------|--------------------------|--------------------------------------|
| 1. Isacs Conference [REDACTED]<br>[REDACTED] | November 8, 2012 -<br>November 9, 2012 | Louisville, KY  | To educate board members | Transportation (bus), meals, tuition |
| 2.                                           |                                        |                 |                          |                                      |
| 3.                                           |                                        |                 |                          |                                      |
| 4.                                           |                                        |                 |                          |                                      |
| 5.                                           |                                        |                 |                          |                                      |

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**V. GIFTS.** *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*☐

NONE (No reportable gifts.)

|    | <u>SOURCE</u>                                              | <u>DESCRIPTION</u>                 | <u>VALUE</u> |
|----|------------------------------------------------------------|------------------------------------|--------------|
| 1. | Federal Bar Association, Northern District of Ohio Chapter | Donation toward public investiture | \$2,500.00   |
| 2. | Toledo Bar Association                                     | Judge's robe                       | \$495.33     |
| 3. |                                                            |                                    |              |
| 4. |                                                            |                                    |              |
| 5. |                                                            |                                    |              |

**VI. LIABILITIES.** *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*☐

NONE (No reportable liabilities.)

|    | <u>CREDITOR</u>  | <u>DESCRIPTION</u> | <u>VALUE CODE</u> |
|----|------------------|--------------------|-------------------|
| 1. | American Express | Credit Card        | K                 |
| 2. |                  | Tuition            | J                 |
| 3. |                  |                    |                   |
| 4. |                  |                    |                   |
| 5. |                  |                    |                   |

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Name of Person Reporting

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## VII. INVESTMENTS and TRUSTS – income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 1. Trust #1 (H)                                                                                                             | E                                       | Int./Div.                                     | O                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 2. -Air Products and Chemicals, Inc. Stock                                                                                  |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 3. -Apache Corp. Stock                                                                                                      |                                         |                                               |                                                 |                                           | Sold                                            | 01/11/12                | K                               | A                              |                                                                   |
| 4. -Apple Inc. Stock                                                                                                        |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 5. -Aston/Fairpointe Mid Cap Fund                                                                                           |                                         |                                               |                                                 |                                           | Buy                                             | 06/20/12                | K                               |                                |                                                                   |
| 6.                                                                                                                          |                                         |                                               |                                                 |                                           | Sold<br>(part)                                  | 09/25/12                | J                               |                                |                                                                   |
| 7. -Bank of Nova Scotia Stock                                                                                               |                                         |                                               |                                                 |                                           | Sold                                            | 10/03/12                | J                               | B                              |                                                                   |
| 8. -BHP Billiton Ltd. Stock                                                                                                 |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 9. -Chevron Corp Stock                                                                                                      |                                         |                                               |                                                 |                                           | Buy                                             | 06/04/12                | J                               |                                |                                                                   |
| 10. -Cisco System Inc. Stock (Y)                                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 11. -Colgate Palmolive Co. Stock                                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 12. -ConocoPhillips Stock                                                                                                   |                                         |                                               |                                                 |                                           | Buy                                             | 01/17/12                | K                               |                                |                                                                   |
| 13. -Dodge & Cox Int'l Stock Fund                                                                                           |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 14. -EMC Corp. (X)                                                                                                          |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 15. -Google, Inc. Stock                                                                                                     |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 16. -Intel Corp. (Y)                                                                                                        |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 17. -Intercontinental Exchange Inc. Stock                                                                                   |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                              |                                                              |                                                       |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H = \$1,000,001 - \$5,000,000       | D = \$5,001 - \$15,000<br>I = More than \$5,000,000          | E = \$15,001 - \$50,000<br>J = More than \$50,000,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                                                       |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                              | T = Cash Market                                              |                                                       |

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Name of Person Reporting

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## VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code I<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                 |  |  |  |  |                           |          |   |   |  |
|-------------------------------------------------|--|--|--|--|---------------------------|----------|---|---|--|
| 18. -iShares MSCI Canada Index (X)              |  |  |  |  |                           |          |   |   |  |
| 19. -iShares MSCI Emerging Markets Index        |  |  |  |  | Sold<br>(part)            | 03/23/12 | J | C |  |
| 20.                                             |  |  |  |  | Sold                      | 10/03/12 | J | C |  |
| 21. -iShares MSCI Pac Ex-Jpn Index (X)          |  |  |  |  |                           |          |   |   |  |
| 22. -Johnson & Johnson Stock                    |  |  |  |  |                           |          |   |   |  |
| 23. -Lowes Companies Inc. Stock (Y)             |  |  |  |  |                           |          |   |   |  |
| 24. -Oracle Corp. Stock                         |  |  |  |  |                           |          |   |   |  |
| 25. -Parker Hannifin Corp. Stock                |  |  |  |  |                           |          |   |   |  |
| 26. -Pepsico Inc. Stock                         |  |  |  |  |                           |          |   |   |  |
| 27. -Phillips 66 Stock                          |  |  |  |  | Spinoff<br>(from line 12) | 05/01/12 | J |   |  |
| 28.                                             |  |  |  |  | Sold                      | 05/30/12 | J |   |  |
| 29. -Royce FD Premier SER Mutual Fund           |  |  |  |  | Buy                       | 06/20/12 | K |   |  |
| 30. -Target Corp. Stock                         |  |  |  |  |                           |          |   |   |  |
| 31. -Teva Pharmaceuticals Industries Inc. Stock |  |  |  |  | Sold                      | 12/20/12 | J |   |  |
| 32. -United Technologies Corp. Stock            |  |  |  |  |                           |          |   |   |  |
| 33. -Vanguard Emerging Markets Fund             |  |  |  |  | Sold<br>(part)            | 10/03/12 | J |   |  |
| 34. -Walgreen Co. Stock                         |  |  |  |  | Sold                      | 05/30/12 | J | C |  |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 1. Income Gain Codes:   | A = \$1,000 or less              | B = \$1,001 - \$2,500       | C = \$2,501 - \$5,000          | D = \$5,001 - \$15,000          | E = \$15,001 - \$50,000 |
| (See Columns B1 and D4) | F = \$50,001 - \$100,000         | G = \$100,001 - \$1,000,000 | H1 = \$1,000,001 - \$5,000,000 | H2 = More than \$5,000,000      |                         |
| 2. Value Codes          | J = \$15,000 or less             | K = \$15,001 - \$50,000     | L = \$50,001 - \$100,000       | M = \$100,001 - \$250,000       |                         |
| (See Columns C1 and D3) | N = \$250,001 - \$500,000        | O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000 | P2 = \$5,000,001 - \$25,000,000 |                         |
|                         | P3 = \$25,000,001 - \$50,000,000 |                             | P4 = More than \$50,000,000    |                                 |                         |
| 3. Value Method Codes   | Q = Appraisal                    | R = Cost (Real Estate Only) | S = Assessment                 | T = Cash Market                 |                         |
| (See Column C2)         | U = Book Value                   | V = Other                   | W = Estimated                  |                                 |                         |

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Name of Person Reporting

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☐ NONE (No reportable income, assets, or transactions.)

| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                      |   |           |   |   |             |          |   |  |  |
|------------------------------------------------------|---|-----------|---|---|-------------|----------|---|--|--|
| 35. -Wells Fargo Co. Stock (Y)                       |   |           |   |   |             |          |   |  |  |
| 36. -Cincinnati Ohio School Dist. Municipal Bond (Y) |   |           |   |   |             |          |   |  |  |
| 37. -Marysville Ohio School Dist. Municipal Bond (Y) |   |           |   |   |             |          |   |  |  |
| 38. -KT Short Term Tax-Free Fund                     |   |           |   |   | Sold (part) | 06/20/12 | L |  |  |
| 39. -KT Short Term Deposit Fund                      |   |           |   |   |             |          |   |  |  |
| 40. IRA #1                                           | A | Int./Div. | J | T |             |          |   |  |  |
| 41. Merrill Lynch Cash/Money Account                 | A | Int./Div. | J | T |             |          |   |  |  |
| 42. -Alcatel Lucent Stock                            |   |           |   |   |             |          |   |  |  |
| 43. -AOL Inc. Stock                                  |   |           |   |   |             |          |   |  |  |
| 44. -LSI Corp. Stock                                 |   |           |   |   |             |          |   |  |  |
| 45. -Time Warner Inc. Stock                          |   |           |   |   |             |          |   |  |  |
| 46. -Time Warner Cable Inc. Stock                    |   |           |   |   |             |          |   |  |  |
| 47. Deferred Compensation #1 (H)                     | D | Int./Div. | L | T |             |          |   |  |  |
| 48. -Ohio DC Stable Value Option                     |   |           |   |   |             |          |   |  |  |
| 49. -Dodge & Cox Stock Fund                          |   |           |   |   |             |          |   |  |  |
| 50. -Fidelity Contrafund                             |   |           |   |   |             |          |   |  |  |
| 51. -FPA Capital Stock Fund                          |   |           |   |   |             |          |   |  |  |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

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|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 52. -PIMCO Total Return Fund                                                                                                |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 53. -Vanguard Capital Opportunity Stock Fund                                                                                |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 54. Securities Account #1 (H)                                                                                               |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 55. -AT&T Inc. Com Stock (Y)                                                                                                |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 56. MetLife Whole Life                                                                                                      | A                                       | Int./Div.                                     | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 57. 5/3 Bank Business Checking Account                                                                                      | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 58.                                                                                                                         |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

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**VIII. ADDITIONAL INFORMATION OR EXPLANATIONS.** *(Indicate part of report.)*

Regarding "Trust #1", the first listing in Part VII, [REDACTED] is the sole beneficiary of the trust.

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## IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: **s/ Jeffrey J. Helmick**

**NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)**

Committee on Financial Disclosure  
Administrative Office of the United States Courts  
Suite 2-301  
One Columbus Circle, N.E.  
Washington, D.C. 20544